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Lawson Requisitions Self-Service User Guide

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Lawson Supply Chain Management

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Chapter 1

Lawson Requisitions Self-Service Overview

The Lawson Requisitions Self-Service application lets you create requests with demand on stock and demand on vendors. You can process, view, and modify requisitions.

This chapter provides a high-level overview of the Lawson Requisitions Self-Service and the Lawson Receiving Self-Service applications and includes information about the major processes and integration with other Lawson and non-Lawson products.

Requisition Processing

The Lawson Requisitions Self-Service application can be divided into three main processes: setup, create, and view and modify requisitions. This section provides an overview of these processes.

Setting Up Requisitions

When you set up the Lawson Requisitions Self-Service application, you must consider the requesting needs for your central reporting structure. Specifically, you must determine the number of requesters, requesting locations, and the approval levels needed, if any. Additional web component setup is also required. For additional information about setting up requisitions, see the *Requisitions User Guide*.

NOTE Requesters can share the same requester ID, as long as each user has their own web server login. If requesters share a requester ID and web ID, they will interfere with each others' orders.

Creating Requisitions

When you create a requisition, you request items from inventory or from vendors. The Lawson Requisitions Self-Service application provides different methods to customize the requesting process for your business needs.

Viewing and Changing Requisitions

The Lawson Requisitions Self-Service application provides tasks to let you maintain and track the status of requisitions for your business needs.

For more information about how to set up the Requisitions application, see the *Requisitions User Guide*.

Setting Up the Search Catalog

The Search Catalog feature looks for keywords in the database to match the search string you entered in the search box. A keyword comes from the Keyword Origin fields defined as "Used" in Keyword Search Setup (IC00.5). These Origin fields come from database fields that identify inventory and non-stock items. Using Keyword Search Load (IC800) keywords are created based on the enabled database fields.

NOTE You must run IC800 on at least one origin field (for example, Items) for to work.

The Inventory Control application dictates which Origin fields and which synonyms are used for searches. For example, Lawson item number, UPC number, or description. Each set of characters separated by a space will create a keyword entry.

Synonyms are words that are similar to the item for which you want to search. For example, for the keyword *coat*, you might want to define the synonyms *jacket*, *parka*, *slicker*, and *windbreaker*.

STEPS

To set up the search catalog

- Access the following forms to define the information listed.

Form	Setup
Corporate Item Group (IC00.1)	Define an item group that defines general parameters for items in that group. Click the Search button to access Keyword Search Setup (IC00.5) to define the data fields to use to create keywords. The data fields are then called "origin."
Keyword Search Setup (IC00.5)	Select the origin fields that your company uses to search. The catalog search is searching on keywords you designated as "used" on Keyword Search Setup. When Keyword Search Load (IC800) is run in update mode, it takes these origin fields and turns them into keywords, based on those designated fields in the database.
Keyword Search Load (IC800)	Create keywords for existing data or create keywords for the new origin for existing data. For example, if you select a new origin, you must run IC800 to create additional new keywords.
Keyword Synonym (IC32.1)	Define the synonyms associated with your keywords. Type as many synonyms as you need for the keyword. **TIP** These may be alternate spellings or synonyms of the keyword.

For more information about how to set up the search catalog, see the *Inventory Control User Guide*.

Defining Categories (optional)

The Categories task is designed to use UNSPSC (United Nations Standard Products and Service Codes).

NOTE Categories use a hierarchical structure called the segment tree. The hierarchy helps you manage the categories list.

Categories let you search for items by category. After you import UNSPSC codes, you can assign them to items using Item Master (IC11.1).

The codes have four levels: segment, family, class, and commodity. These levels create an item hierarchy and let you search each level for items in the Item Master file. These codes are attached to items on IC11.

After you define categories, you can click on a category top level in to open the segment tree to the product, family, class, commodity, branches, and items. You select items at any of the levels.

STEPS

To set up categories

- Access the following forms to define the information listed.

Form	Setup
Load UNSPSC Product Codes (IC516) (optional)	Load UNSPSC codes to use in the application. UNSPSC codes let you search by category. The UNSPSC code must be attached to an item in the Item Master file to be active. **NOTE** Standard UNSPSC codes are available for download from **www. unspsc.org**.
UNSPSC Product Codes (IC16.1)	A standardized way to categorize items. **NOTE** is designed for use with UNSPSC codes, but you can also define your own four-tier structure.
Item Master (IC11.1)	You can assign UNSPSC codes to each item in a class.

For more information about how to set up categories, see the *Inventory Control User Guide*.

Chapter 3

Creating a Requisition

This chapter describes how to create a requisition. You can create a requisition by using one or more of the following Find/Shop menu tasks:

- Search Catalog
- Shopping List
- Express Order
- Categories
- Special/Service
- Punchout

Concepts in this Chapter

TIP To skip directly to the procedures, see "Procedures in this Chapter" on page 35.

The following concepts provide background and conceptual information for the procedures within this chapter.

What is the Profile Page?

The Profile page contains your requisition header information, including requesting location, From company, From location, and accounting information. The values default based on the requester that is entered on Requesters (RQ04.1).

NOTE The requisition header itself is created when you click the Find/Shop menu, and select a task.

Tab	Description
Basic	The Basic tab displays requested delivery date, deliver to location, and data specific to this requisition.
Detail Profile	The Detail Profile tab provides additional default data definitions and some information from Requesting Location (RQ01.1).
Drop Ship (optional)	The Drop Ship tab provides address information from Requesting Location (RQ01.1) and additional default data. You can enable or disable Drop Ship on Requesters (RQ04.1).
Accounting	The Accounting tab provides information from Requesting Location (RQ01.1). You can also select data.
User Fields	The User Fields tab provides input details for Requisition and Purchase Order fields.
Comments	Comments appear on internal documents, requisitions, purchase orders at header or trailer, on warehouse pick lists, receiving documents, or as display only on requisition lines.
User Analysis (optional)	The User Analysis tab is viewable if Strategic Ledger has been enabled.

What is the Express Order Task?

The Express Order task lets you add a specific item to the shopping cart. Use this task when you know the exact item that you want to add to the cart.

What is a Shopping List?

A shopping list is a predefined procurement template. This template is defined in the Purchase Order application on Procurement Templates (PO15.1). Before you use the Shopping List task, you must set up procurement templates in the Purchase Order application. The shopping lists that are viewable is determined by template participants.

What is a Procurement Template?

Procurement templates include items that are frequently ordered. Using a template makes ordering such items quick and efficient. In addition, templates can be used when creating requisitions.

What is the Search Catalog?

The Search Catalog lets you search for items in the Item Master file. You can search for items and keywords in up to 30 origin fields that were defined during setup.

What is a Special/Service Item?

A special item is not defined on Item Master (IC11.1) and is not tracked in inventory.

A service item is used for services, such as equipment repair or monthly copier maintenance. There are two types of service items; Amount and Quantity.

What is the Categories Task?

The Categories task lets you search for items by category. Imported UNSPSC codes or user-defined UNSPSC codes are assigned on Item Master (IC11.1).

After you define categories, you can click on a category top level for Lawson Requisitions Self-Service to open the segment tree to the product, family, commodity branches, and finally items. You can select items at any of the levels.

What is the Punchout Task?

The Punchout task lets requesters access external vendors' websites, shop for items, and return selections to a Lawson requisition. The Punchout task is a vendor-managed catalog, where items and prices are determined by your trading partner relationship. The shopping experience for each Punchout vendor is unique.

What is the Shopping Cart?

The shopping cart displays the total number of items and the total transaction amount for a requisition (in base currency). The shopping cart dynamically builds quantity and amount for items in the cart.

The icons and buttons that display in the cart let you view line information and make changes.

Icons appear next to the items in the shopping cart. Click the trash can icon to delete a requisition line, or the disk icon to save all line items in the cart. An "i" icon on the right-hand side lists three pieces of information - transaction unit cost, transaction currency code, and line status (viewable by mousing over the icon). If a red circle with an "X" in it displays next to an item, an error exists and you can view it by mousing over the red circle. You need to correct the error and save your changes before you can checkout. (You cannot checkout until these errors are corrected.) An example of a possible error is "Must enter unit cost".

Buttons at the bottom of the cart are available once items have been added. The following describes what each button does.

- New - Creates a new requisition (if existing lines are not saved or you haven't selected any lines, the current requisition header is deleted). Also refreshes the requester's data defaults if your requester has been updated in Requesters (RQ04.1).
- Clear - Clears items that you have added to the cart, but leaves the requisition header.
- Print - Previews the items in the cart, including item type, quantity, unit and extended cost, distributions, and requested delivery date. To print the contents of the cart, click the Send to Printer button and select a printer.
- Save - Saves your changes to the items in the cart and updates the order. You inquire on the requisition by clicking on Inquire, then entering the requisition number on the Order Inquiry tab.
- Checkout - Saves items in the cart to be requisition lines and moves the requisition to the next processing stage (for example, releases the requisition).

NOTE If you inquire on a processed requisition, closed requisition, rejected requisition, or needs approval, only the Print and New buttons display.

What are Item Details?

Once an item has been added to the shopping cart via a task, certain fields can be changed. By clicking on the item number in the shopping cart, the item details appear in the work area.

The requisition line displays, listing the item, quantity, unit of measure, cost, currency, and line status. In addition, six tabs display for the line, namely:

- Line Basic
- Line Detail
- Line Accounting
- Line User Fields
- Line User Analysis
- Line Comments

For more information, see "Editing the Shopping Cart" on page 51.

What is the Inquire Page?

The Inquire page lets you search for requisitions. Options are available to search by requisition status, requisition number, requisition description, reference number, requesting location, status, and line status.

You can inquire on the requisitions you entered or requisitions entered by others. You can search by requester, company, location, date range, status, and requisition number. Requisitions display in the order of newest (at the top) to oldest, and the Approval Status is also displayed.

You can use the drill option to see if a PO has been created for the requisition. The PO number and line assigned to the item order is displayed. View the status of orders using Fill and Kill. There is also a link to RAD to check on delivery and package statuses.

Line Inquire allows you to search for a Lawson item, creation date, or requesting location. Line Status allows users to search requisitions at the line level and includes all of the features listed above.